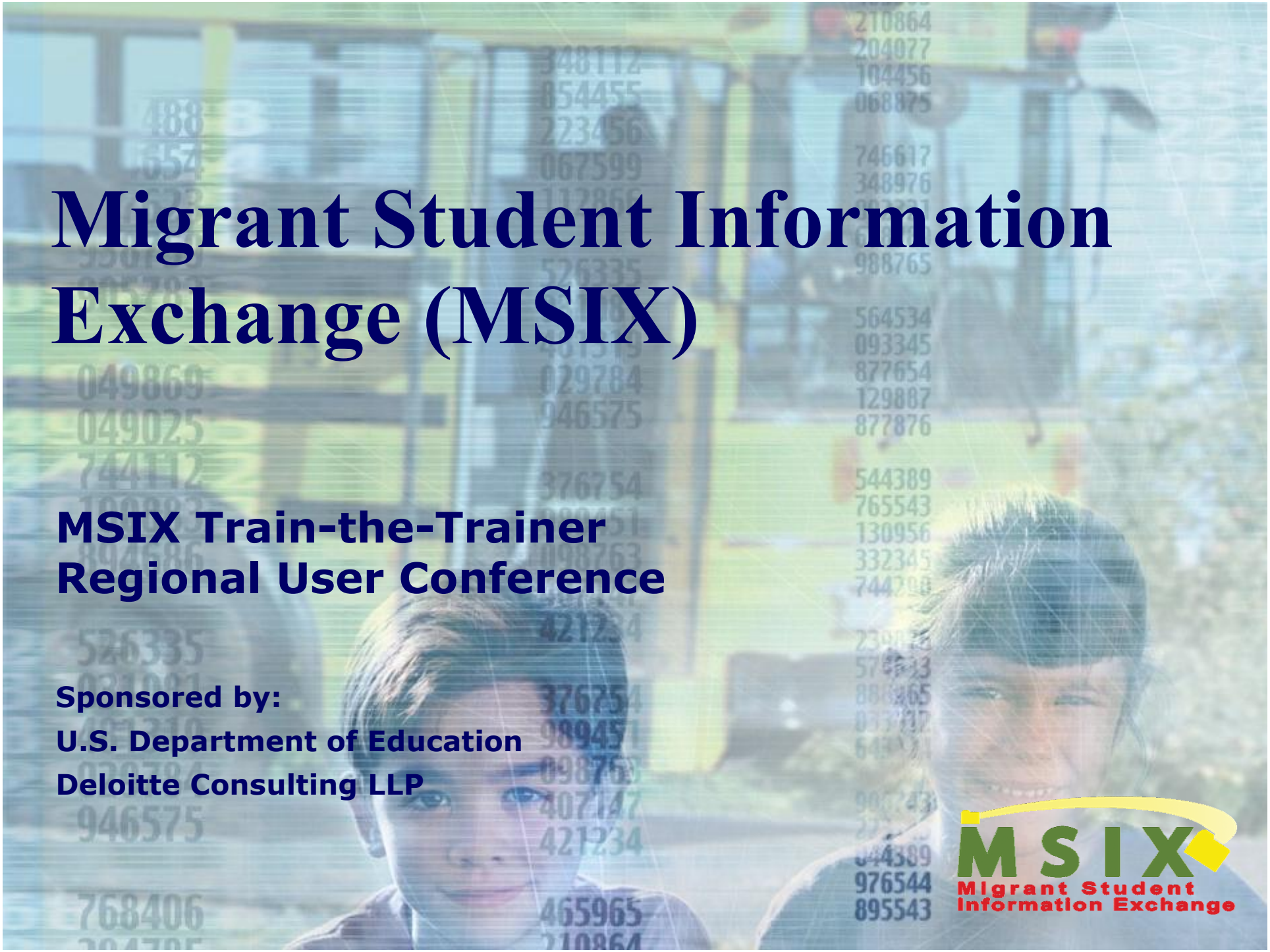
Migrant Student Information Exchange (MSIX)

MSIX Train-the-Trainer
Regional User Conference

Sponsored by:

U.S. Department of Education

Deloitte Consulting LLP



DAY ONE

Welcome and Logistics

Conference Schedule – Day 1

Time	Agenda Item	Description
DAY 1 (Hotel Meeting Room)		
9:00 - 9:15	Welcome and Logistics	Overview of the agenda and address conference logistics
9:15 – 9:35	Introduction to MSIX	Description of MSIX background, objectives, and overview
9:35 – 9:45	The MSIX Solution	Description of MSIX business processes, workflows, user roles, and implementation timeline
9:45 - 10:05	Online Tour of MSIX	Overview of system and MSIX functionality from a User perspective
10:05 – 10:25	**Data Administrator**	Overview of the Data Administrator Role
10:25 – 10:40	**BREAK**	
10:40 – 11:20	**Data Administrator –** *Demonstration*	Demonstrate Near Match, Merge, and Split functionality
11:20 – 12:40	**Lunch and Move to Training Center**	
12:40 – 1:15	**Data Administrator -** *Online Training*	Self-guided walk-through of Data Administrator online training module – User-Initiated Merge section
1:15 – 1:25	**Primary User Role**	Overview of the Primary User Role
1:25 – 1:35	**Primary User -** *Online Training*	Facilitated walk-through of Primary User online training module
1:35 – 1:50	**BREAK**	
1:50 – 2:30	**Primary User -** *Hands-on Exercises*	Hands-on scenario to: General Login and Navigation, Student Search, Send and Receive Notifications
2:30 – 2:40	Scavenger Hunt – *Hands-on Exercise*	Exercise to find and identify support resources available through the MSIX website
2:40 – 3:00	Day 1 Wrap-up Q&A	Group discussion of MSIX functionality. Discussion will be guided based on questions that arise during the conference.

Train the Trainer Conference Logistics

- Conference facility
  - Security
  - Restrooms
  - Smoking areas
  - Food and beverages in the training room
- Reimbursement process
- Questions??

Introduction to MSIX

Train the Trainer Conference Objectives

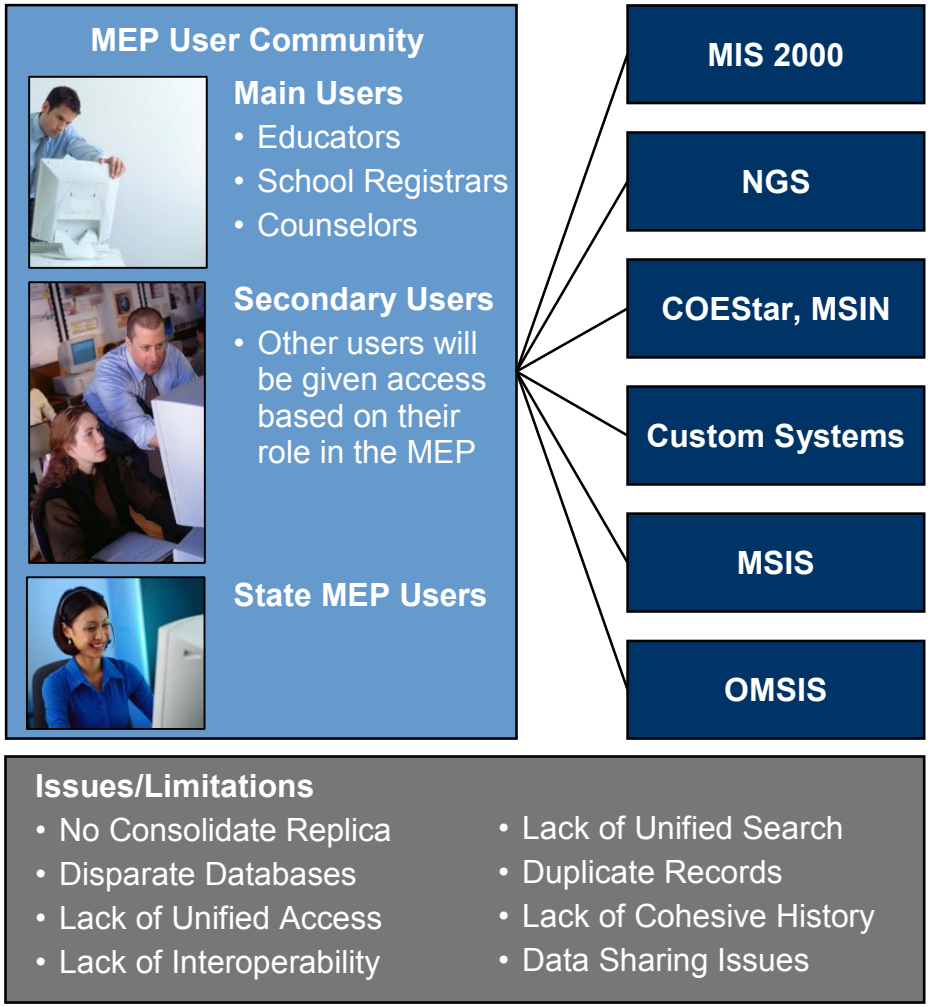
- MSIX Overview
  - Background
  - Objectives
- Discuss MSIX Roll Out
  - Timeline and Activities
  - User Account Access Process
- MSIX Train-the-Trainer Activities
  - Review Training Resources
  - Online Training Modules
  - Hands-on Exercises
  - MSIX Demonstrations

The Need for Migrant Student Records Exchange

- Highly mobile migrant student population
- Students move from State-to-State often without notice
- Timely and accurate educational and health information not always available
- Students placed in incorrect courses or grades
- Students not provided most beneficial MEP services

The Current Records Exchange Environment

- States use disparate migrant student databases to maintain information
- Some States sharing migrant student databases have limited ability to electronically exchange records
- Many States still exchange records via fax or regular mail



Records Exchange Background

The 2001 No Child Left Behind Act requires ED to:

1. Assist States in developing methods for electronic transfer of records

2. Ensure the linkage of migrant student record systems

3. Utilize existing migrant student systems

4. Establish the minimum data elements (MDE) States must collect and maintain

Records Exchange Initiative Goals

- Goal 1: Create an electronic exchange for the transfer of migrant student education and health data amongst the States

- Goal 2: Promote the use of the Migrant Student Information Exchange (MSIX)

- Goal 3: Ensure the use of the consolidated migrant student record for the purposes of enrollment, placement and accrual of credits of migrant students

- Goal 4: Produce national data on the migrant population

What is MSIX?

MSIX is a web-based portal that links States' migrant student record databases to facilitate the national exchange of migrant students' educational and health information among the States

MSIX
Migrant Student Information Exchange

MSIX Overview

What MSIX does…	What MSIX does not do…
• MSIX produces a single "consolidated record" for each migrant child that contains information from each State in which the child was ever enrolled • MSIX contains the minimum data elements necessary for the proper enrollment, grade and course placement, and accrual of credits for migrant children	• MSIX does not replace existing migrant student information systems

The MSIX Solution

MSIX Services

MIS 2000

NGS

COEStar

Other

State MEP Systems

sFTP File Transfer

Enter /View Student Data

End Users

View Student Data

MSIX Portal

- **Receives Data from Individual State Systems**
- **End Users can review Consolidated Data from All States**

MSIX Services

Migrant Student Records
- Record Matching
- Resolve Record Conflicts
- Student History
  - Enrollments
  - Courses
  - Assessments

Data Upload
- Data Configuration
- Scheduling

Security
- Role-based Access
- Encryption

User Administration
- Registration/Maintenance
- Login/Password

Reference Data
- States
- Schools
- Demographics

Reporting
- Data Reports
- Information Exchange Reports
- OME Reports
- Display as Word, Excel, and PDF

MSIX Key Features

- Create users based on 'MSIX roles' to allow appropriate access to MSIX functions and student data
- Create regions within states to manage MSIX activities and workflow
- Retrieve and view student information
  - Search, view and print consolidated student records
  - Multiple search parameters
  - Accessible online
  - Printed reports available
- Identify and resolve student record conflicts
  - Student Merge workflow
  - Student Split workflow
- Notify other jurisdictions of planned student moves

MSIX Workflows

- Student 'Merge' : combine multiple records for the same student
  - Resolve MSIX-identified potential merges ('near matches')
  - User-Initiated merge, to manually combine student records
  - *Validate, through a review and approval workflow (facilitated by user worklists, action escalations, and email notifications)*

- Student 'Split' : separate erroneously combined students
  - User-Initiated split, to manually separate a merged student record
  - *Validate, through a review and approval workflow (facilitated by user worklists and email notifications)*

MSIX Functions by User Role

	Primary User	Secondary User	District Data Admin	Regional Data Admin	State Data Admin	State Region Admin	Regional User Admin	State User Admin
My Account	X	X	X	X	X	X	X	X
Search, Display, Print, & Export Student Records in own state	X	X	X	X	X			
Search, Display, Print, & Export Student Records in all states	X		X	X	X			
Generate Reports		X	X	X	X			
Send Student Move Notices	X	X	X	X	X			
Initiate Student Merges and Splits	X		X	X	X			
Validate / Reject Student Merges and Splits			X	X	X			
Access District Worklist Items			X					
Access Region Worklist Items				X				
Access State Worklist Items					X			
Create / Modify State User Level Accounts								X
Create / Modify Regional Level User Accounts							X	X
Create / Modify School or District Level User Accounts							X	X
Reset Passwords							X	X
Enable Regional Functionality						X		
Create / Modify Regions						X		

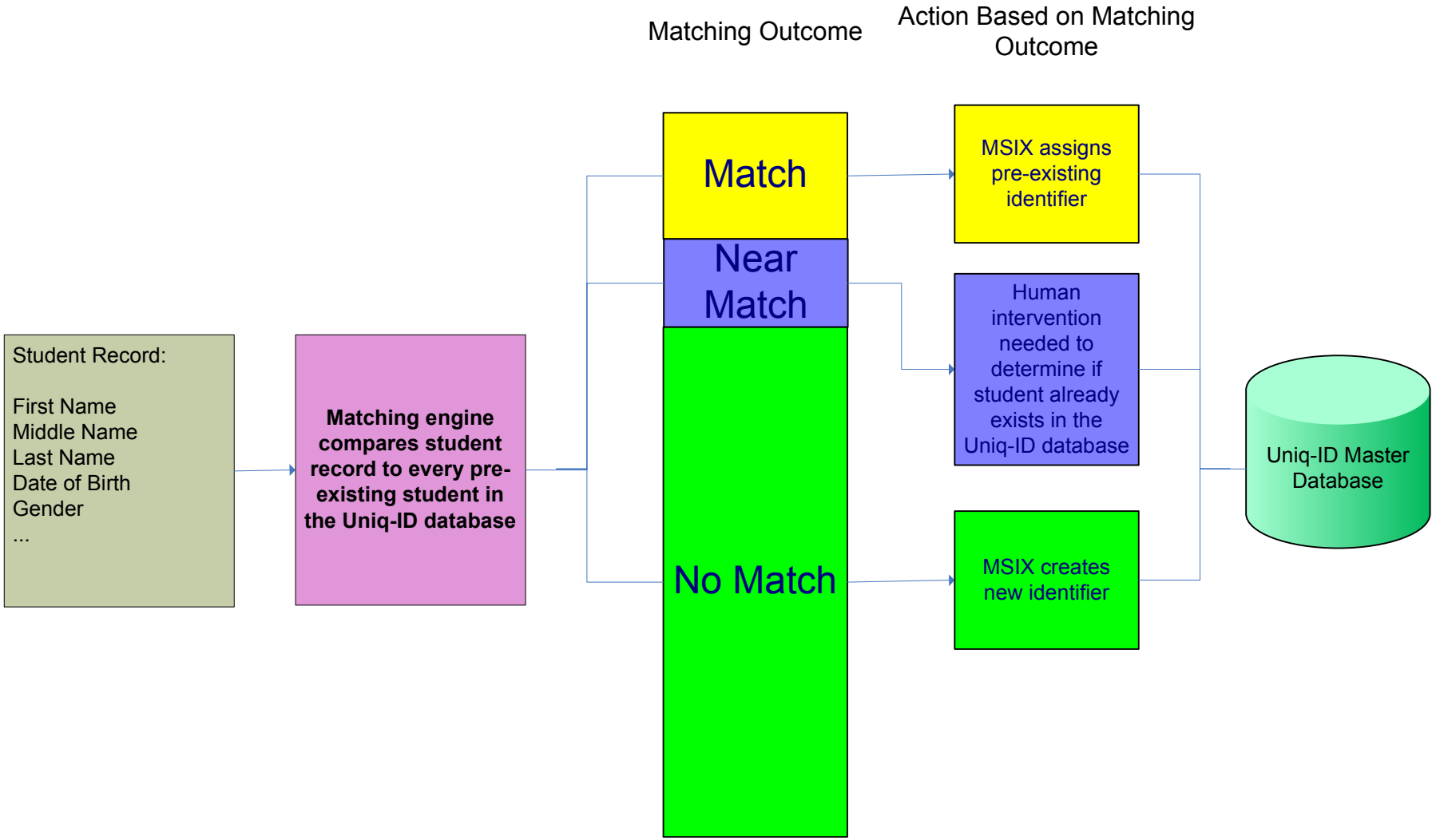
Online Tour of MSIX

Data Administrator Role

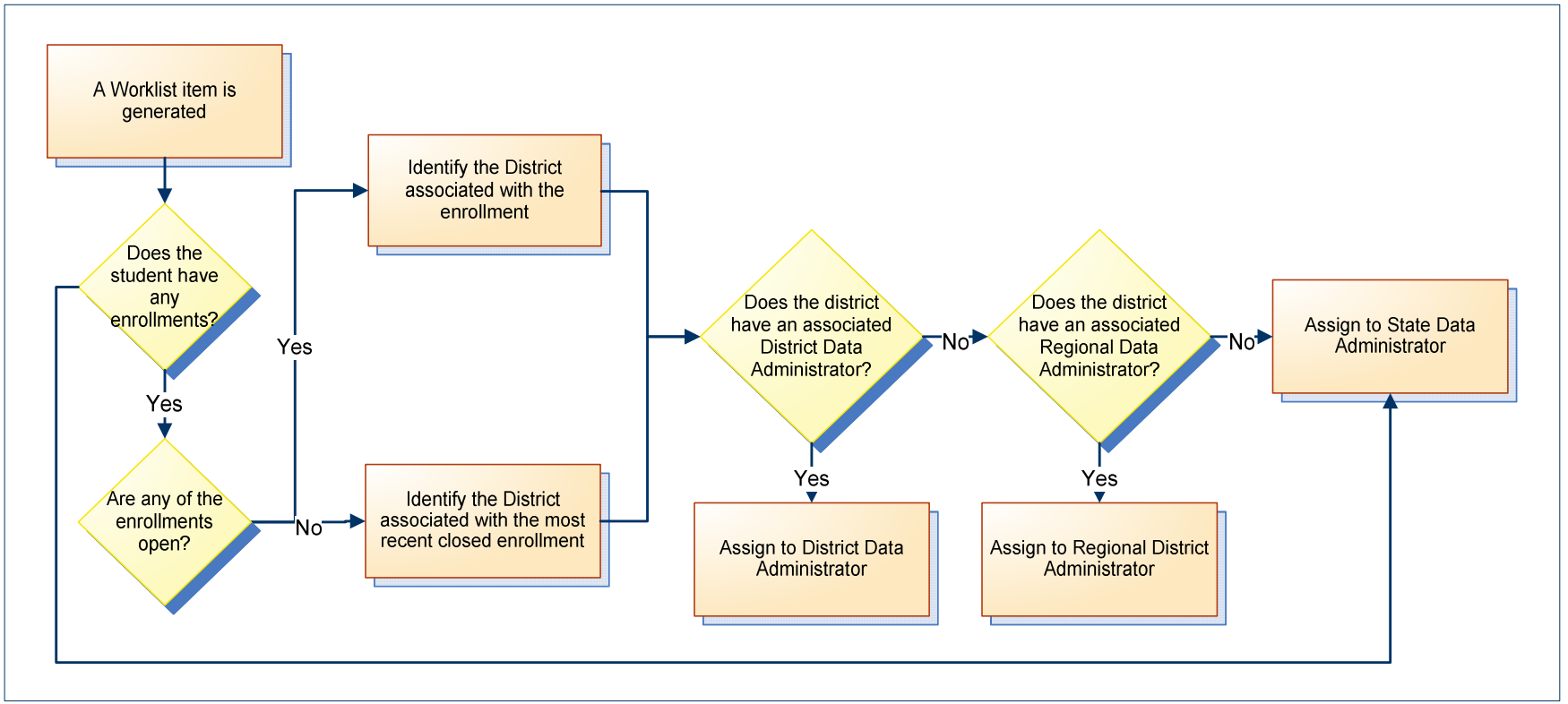
Data Administrator Role Overview

- 3 Data Administrator Levels
  - State Data Administrator – Minimum 1 per State required
  - Regional Data Administrator – State Option
  - District Data Administrator – State Option
- Potential Users
  - State MEP Administrators
  - MEP Data entry staff
- Key Functions
  - Search, display, and print student records
  - Generate data and Information Exchange Reports
  - Initiate merge and split of student records
  - Validate or reject record near matches, merges, and splits
  - Resolve data quality issues
  - Email notification of an arrival or departure of a student
  - Export student records to a file for upload into their State's system

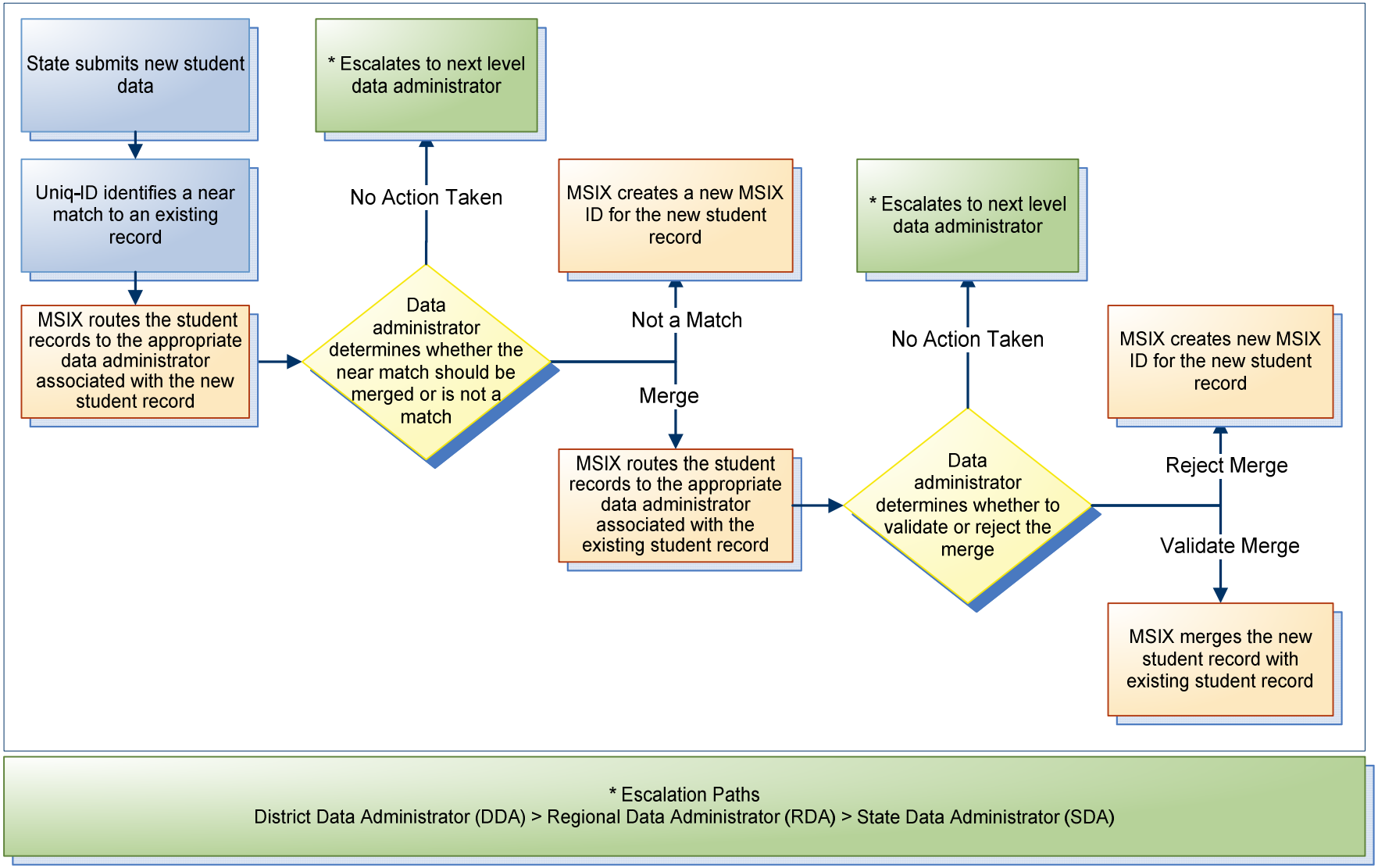
Uniq-ID Student Record Match



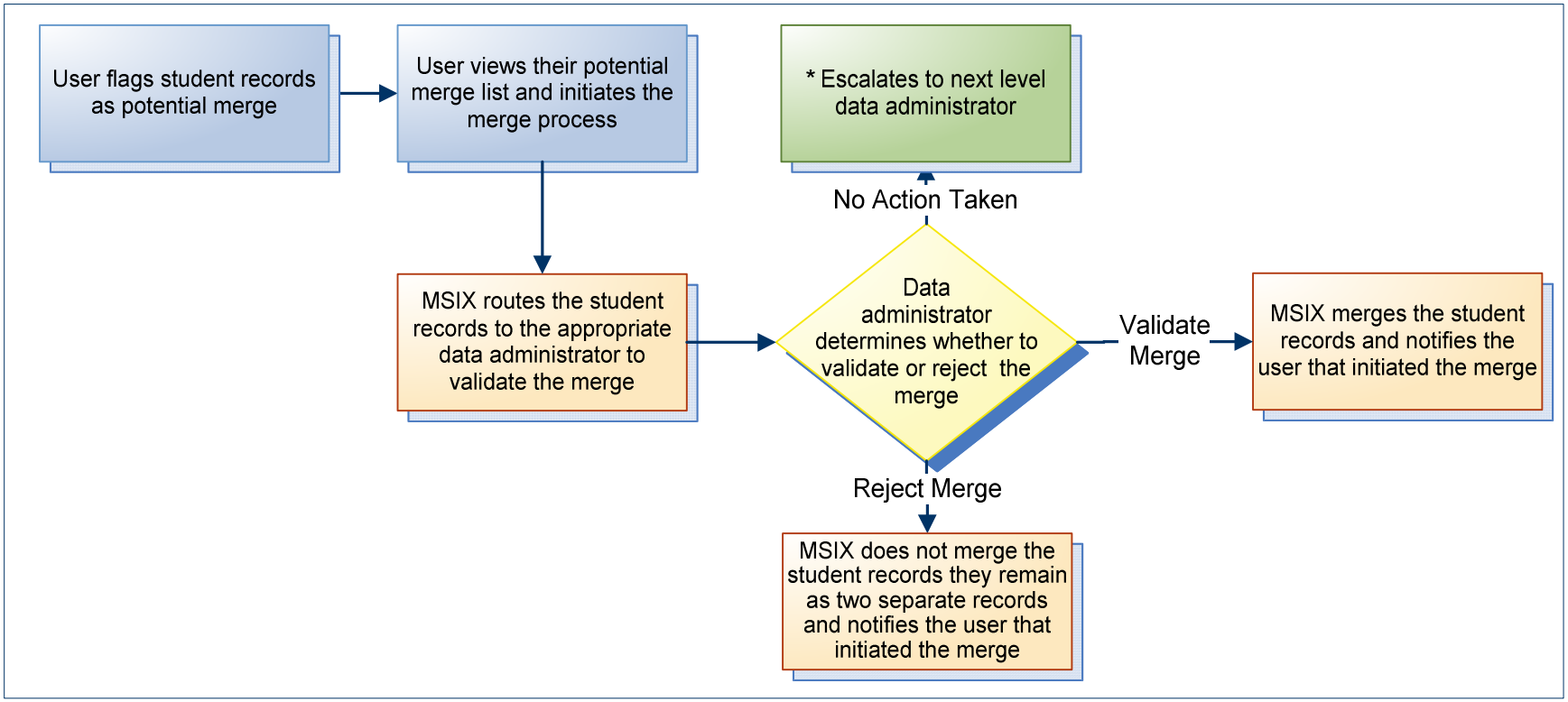
Worklist Assignment and Escalation



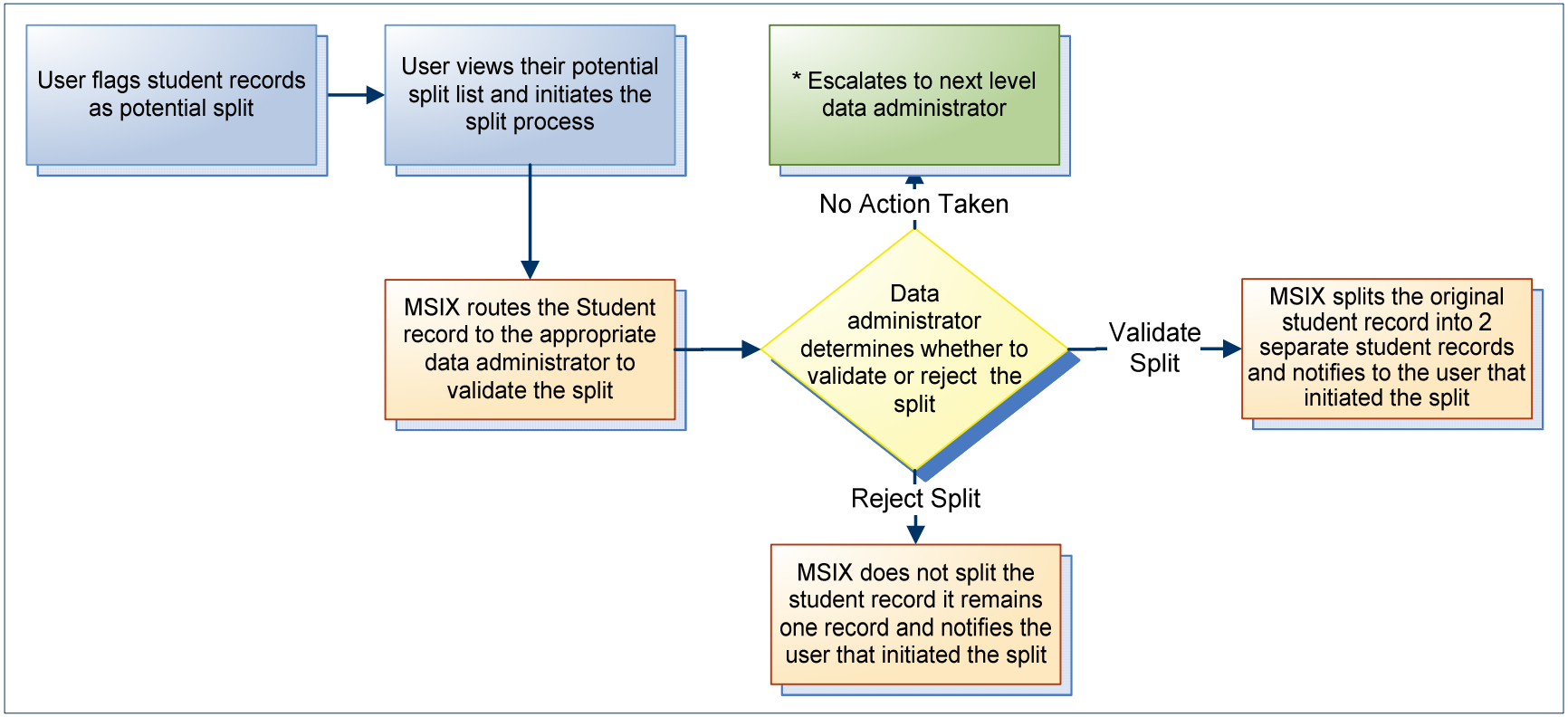
Workflow for Near Match Resolution



Workflow for User Initiated Merge

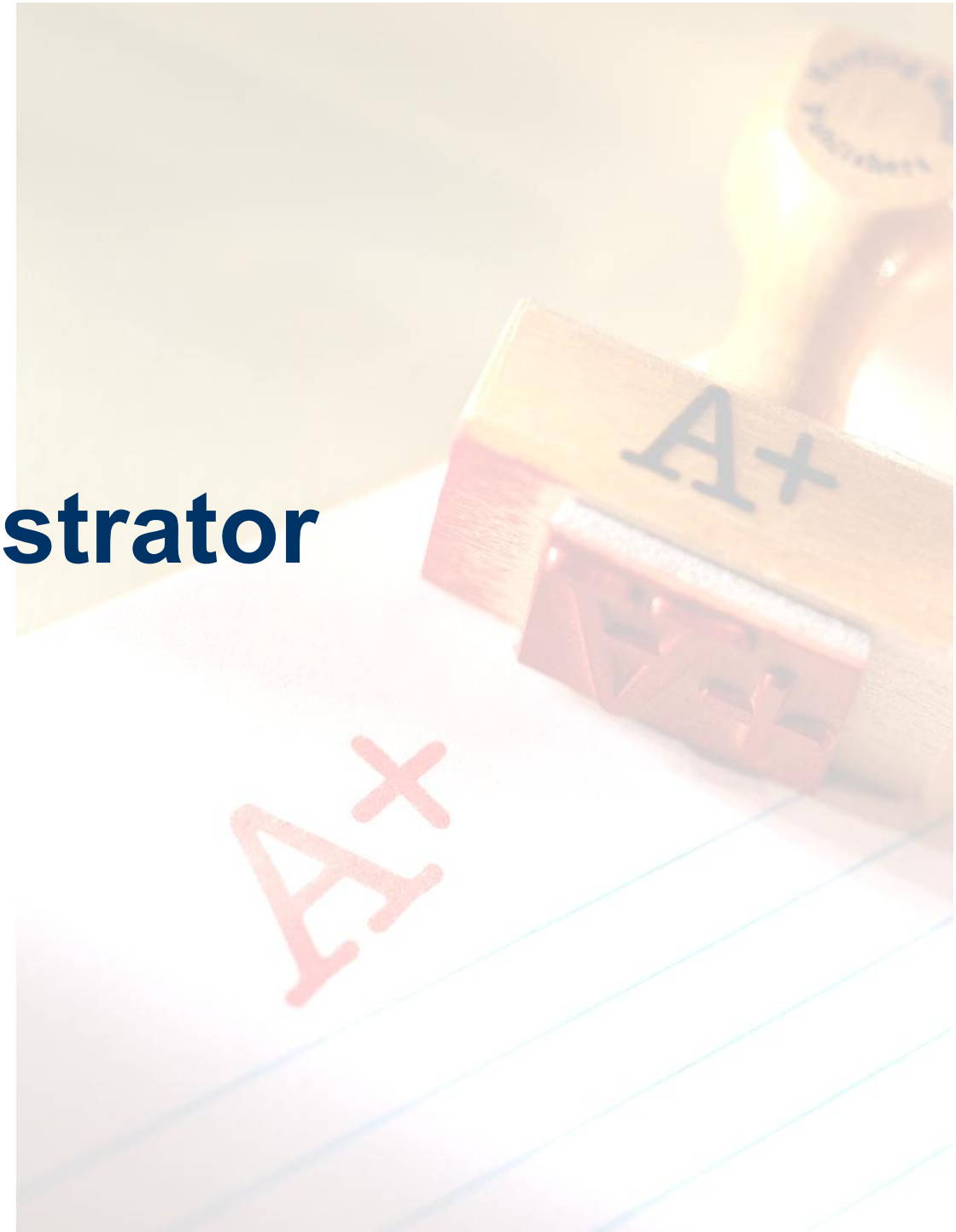


Workflow for Splitting Student Records



* Escalation Paths
District Data Administrator (DDA) > Regional Data Administrator (RDA) > State Data Administrator (SDA)

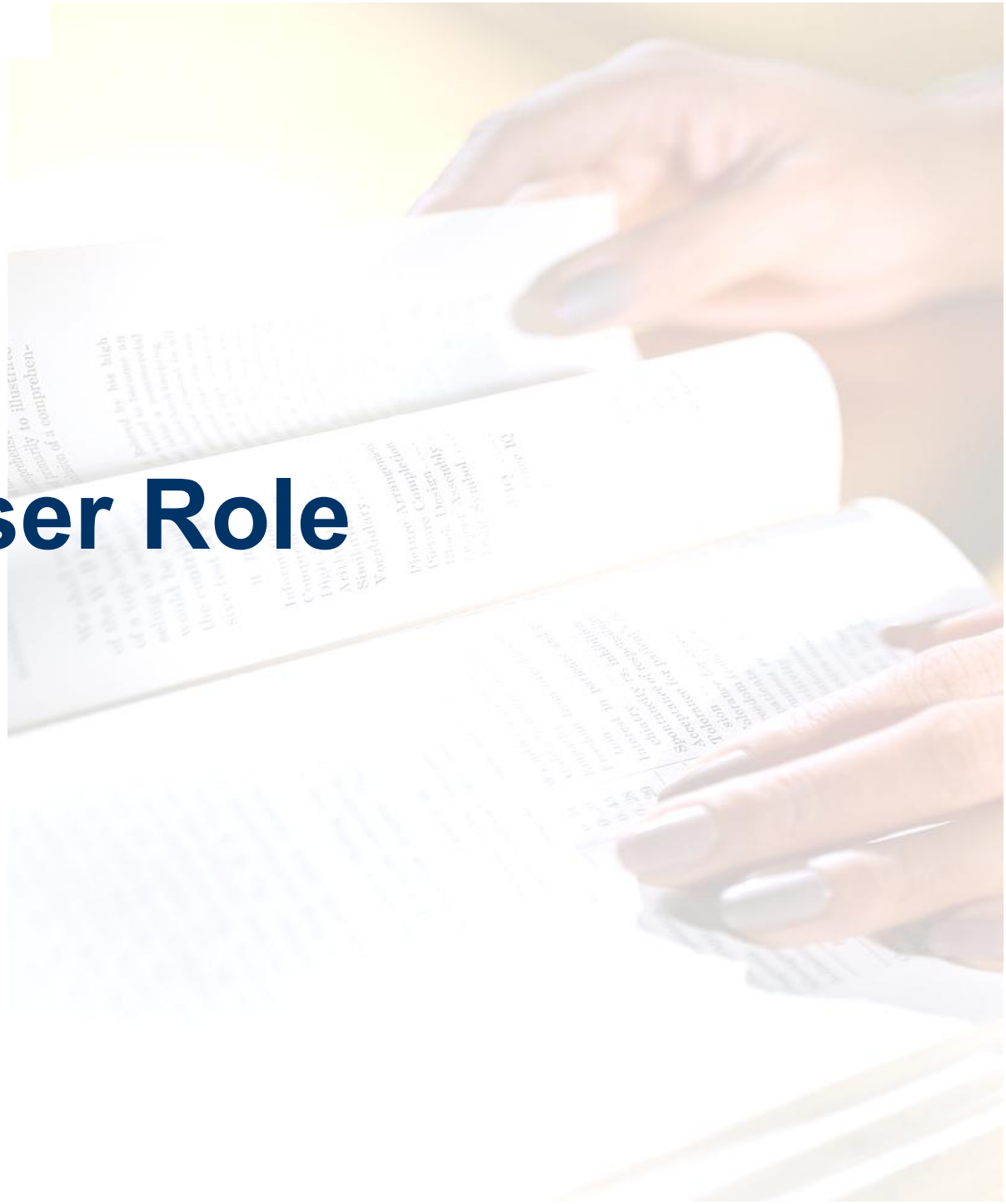
Data Administrator
Demonstration



Data Administrator
Online Training

Online Training Modules

Primary User Role

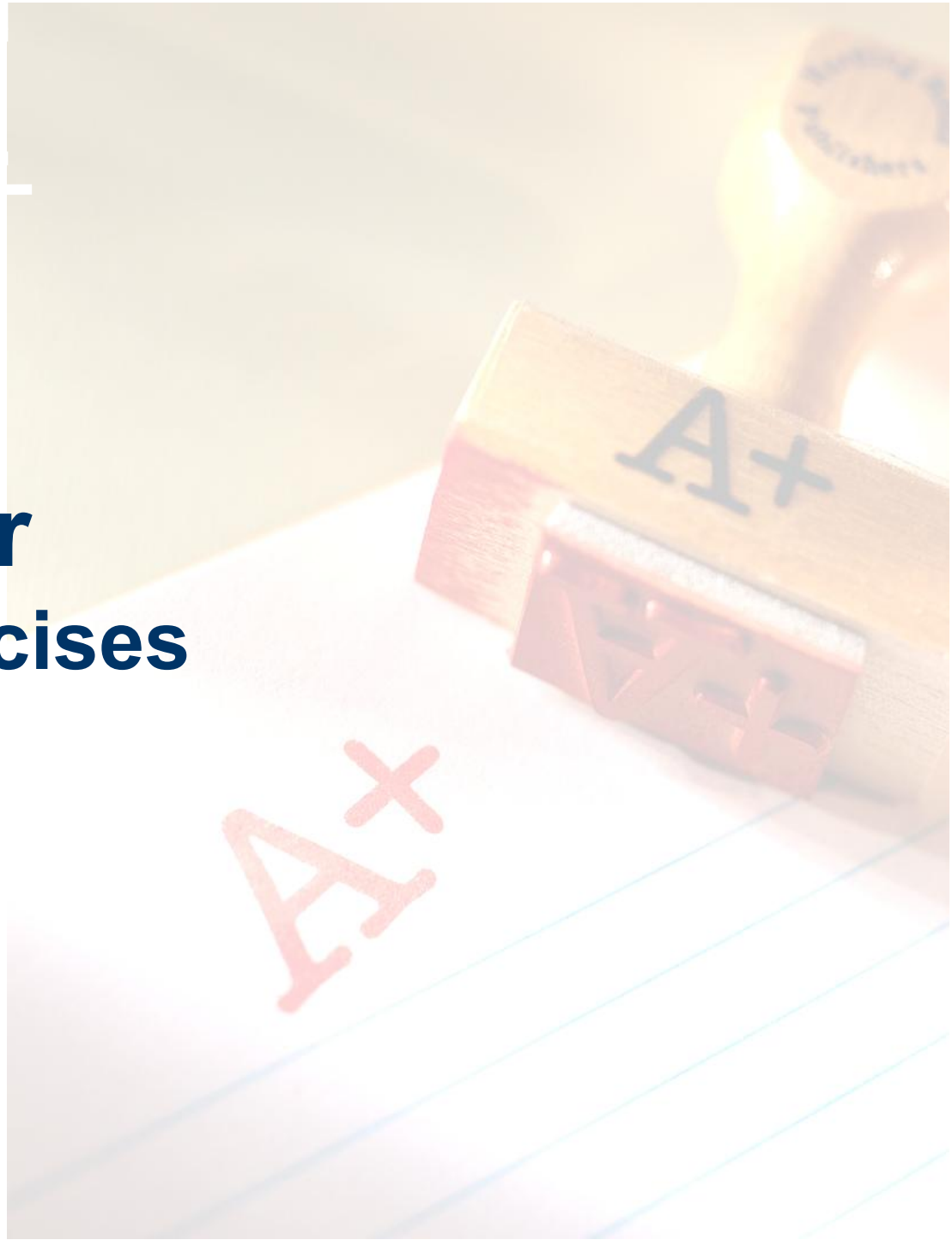


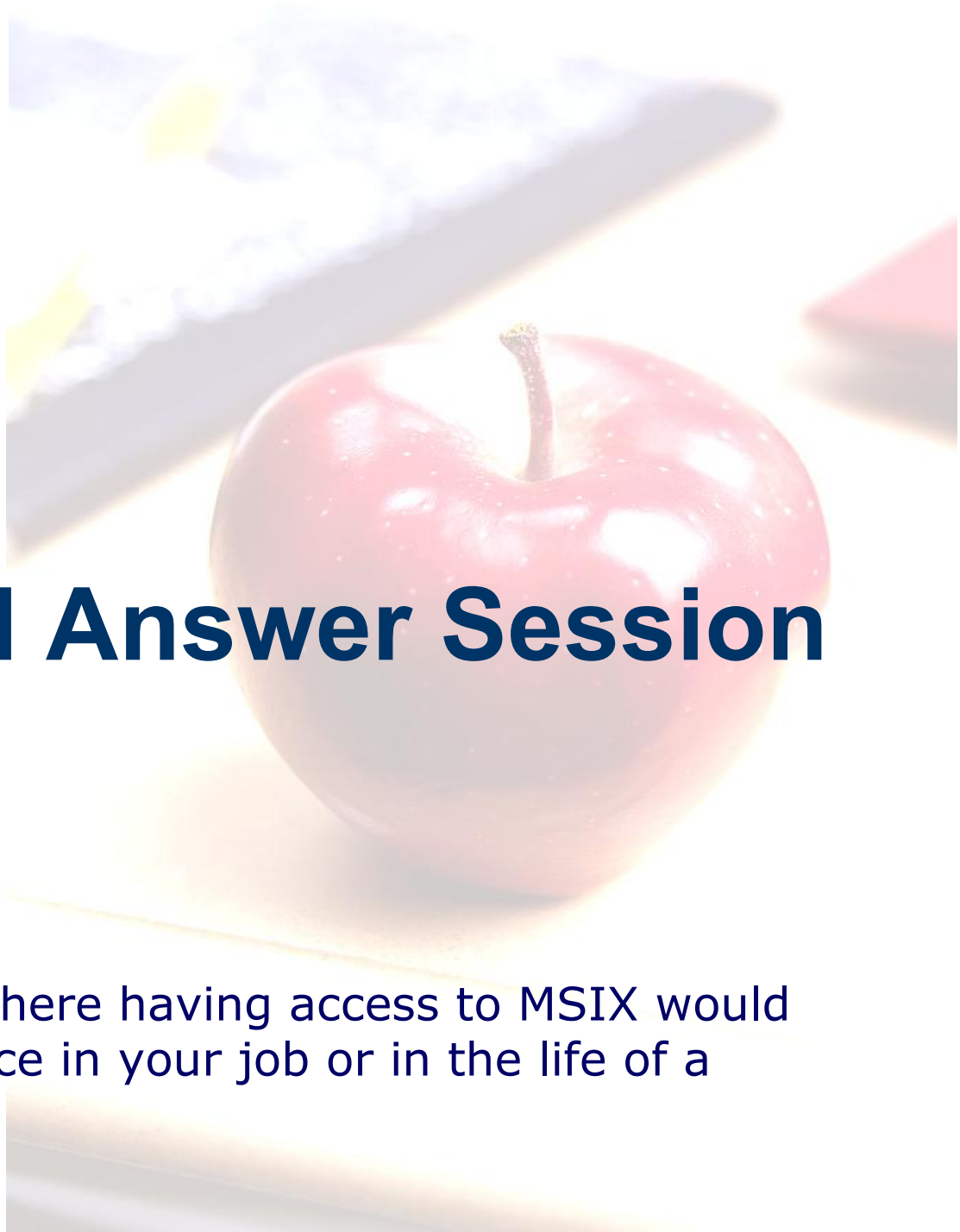
Primary User Role Overview

- Most common MSIX User Role
- Potential Users
  - Guidance Counselor
  - MEP Data Entry Staff
  - Registrar
  - Teachers
- Key Functions
  - Search, display, and print student records
  - Initiate merge and split of student records
  - Email notification of an arrival or departure of a student
  - Export student records to a file for upload into their State's system (States to determine how to utilize this function)

Primary User
Online Training

Primary User
Hands-on Exercises





Wrap-up
Question and Answer Session

Homework:

- Think of a situation where having access to MSIX would have made a difference in your job or in the life of a Migrant Student

DAY TWO

Conference Schedule – Day 2

Time	Agenda Item	Description
DAY 2 (Hotel Meeting Room)		
9:00 – 9:20	Discussion	General debrief of Day 1 activities. Group discussion of MSIX functionality and walk through specific issues, if necessary. Review Day 2 Agenda.
9:20 – 9:45	MSIX Rollout & States Assistance	Detailed discussion of the MSIX Implementation schedule focused on testing and loading state data files
9:45 – 10:30	MSIX Training and Support Tools	Overview of the MSIX training approach and review available training resources
10:30 – 10:50	**BREAK and Move to Training Center**	
10:50 – 11:05	**User Administrator Role**	Overview of the User Administrator Role
11:05 – 11:25	**User Administrator –** *Online Training*	Self-guided walk-through of User Administrator online training module
11:25 – 11:50	**User Administrator** - *Hands-on Exercises*	Hands-on scenarios to: Create New User Accounts, Update Existing User Accounts
11:50 – 12:00	**State Region Administrator Role**	Overview of the State Region Administrator Role
12:00 - 1:00	**LUNCH**	
1:00 – 1:20	**State Region Administrator -** *Online Training*	Self-guided walk-through of State Region Administrator online training module
1:20 – 2:00	**State Region Administrator** – *Hands-on Exercises*	Hands-on scenarios to: Create Regions, Modify Regions
2:00 – 2:10	The Privacy Act	A discussion of the Privacy Act and MSIX
2:10 – 2:20	Next Steps	Discuss the schedule of Next-Steps to be taken by the States and the MSIX Team
2:20-2:30	Q&A and Wrap-Up	Group discussion of MSIX functionality based on questions that arise during the conference (if needed) Closing Remarks

Day 1 Review

- MSIX Online Training
- MSIX Functionality
  - Primary User Role
  - Data Administrator Role
- Questions and Discussion??

MSIX Suggestions from DAY 1 (Chicago)

- Allow student searches using partial DOB's
- Add external link to NCES website
- Provide a comment field on the User-Initiated Merge Validation page
- Copy the person that originated a move notification email on that email
- Discuss and review security associated with Student Record download process

MSIX Suggestions from DAY 1 (Portland)

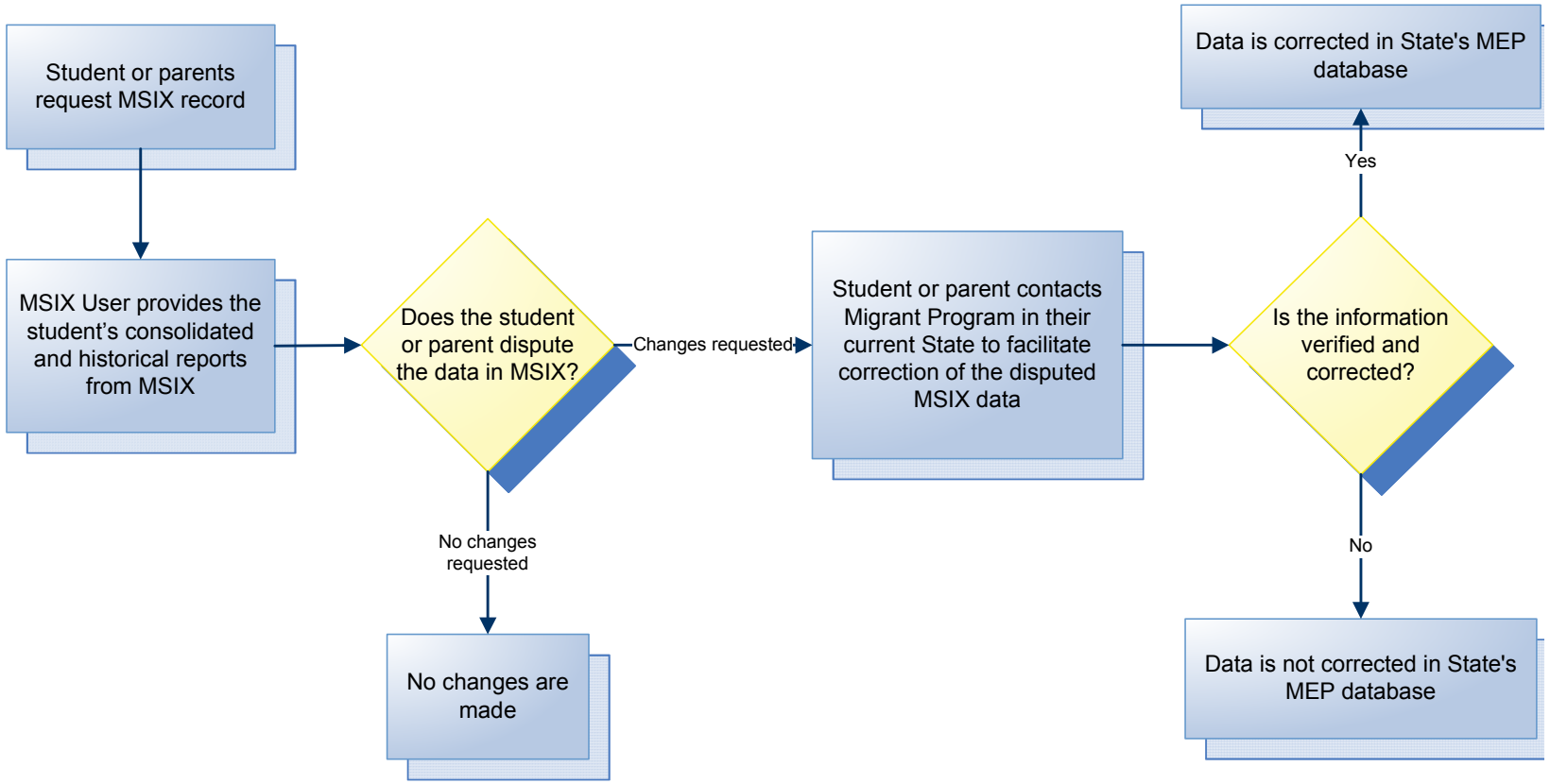
- Include more information about the Help Desk in the FAQ's
- Provide worklist reports to show worklist history and ties open worklist items to users in the State.
- Make user comments associated with merges and splits more visible.
- Modify the length of the automatic escalation process during the initial load period.
- Support bulk student move email notifications and bulk record exports
- Indicate if a record is flagged for a merge or a split (if the record is flagged) on the consolidated record view.
- Add a Back to Near Match link on the Historical View page when it is reached from the Near Match page.
- Clarify the significance of selecting the master record during the split. Possibly make current explanation more visible.

MSIX Suggestions from DAY 1 (DC)

- Support multiple State User Applications for download
- Include data correction contact info as part of the State Profile
- Identify appropriate Data Administrator for each Student (to address Privacy Act issues)
- Provide the Merge/Split history for an MSIX ID to help determine which should become a Master Record
- Provide better data examples in Training modules
- Discuss District & Worklist assignment for non-school based MEP Project enrollments
- Highlight changes to User Accounts on Confirmation Page
- Show Green arrows in Online Training only when requested or for errors
- Indicate where to find the correct answer when user selects the incorrect answer in Online Training

Privacy Act

MSIX and the Privacy Act

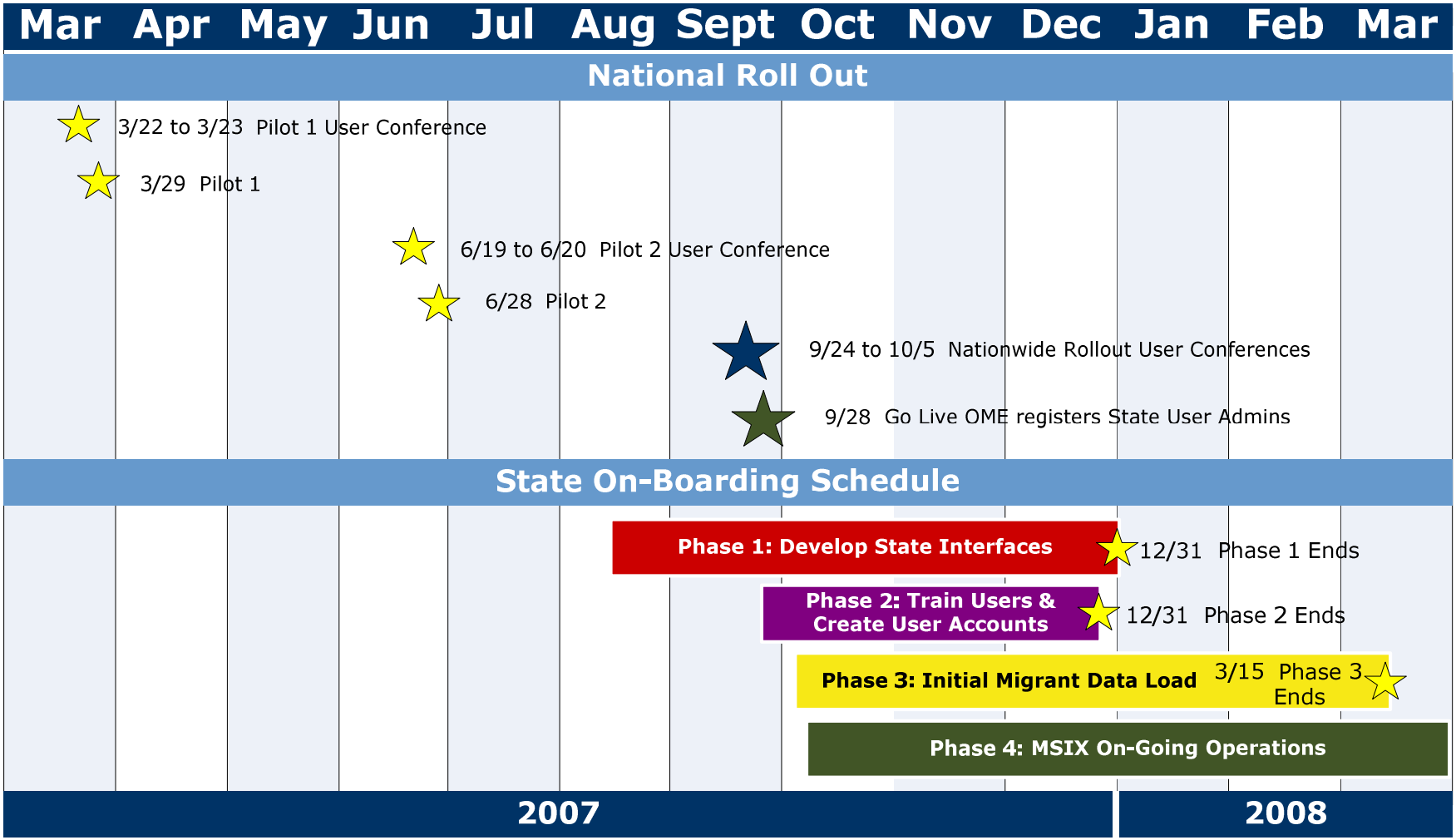


NOTE:
Incorrect student information **cannot** be updated directly in MSIX.

The State that provided incorrect information must update the student's record in it own State system.

MSIX Rollout and States' Assistance

MSIX Implementation Overview



State On-Boarding Phases

PHASE 1
Deploy State Interfaces

Begin anytime

- Provide State MEP system information by completing State Profile
- Confirm State Tech Lead
- Schedule Data File Tests
- Test State Interface

PHASE 2
Train Users & Create User Accounts

Begin after Sept. 24, 2007

1. Attend MSIX Regional Training
2. Designate State User Admin
3. State User Admin Training
4. Create Regions (as appropriate)
5. User Training
6. Create User Accounts (as appropriate)

PHASE 3
Initial Migrant Data Load

Begin after completing Phases 1 and 2

- Provide migrant data file
- Test migrant data file for proper formatting
- Load migrant data file into MSIX
- Report results of loading migrant data file
- Verify that the date records loaded correctly

PHASE 4
MSIX On-Going Operations

Begin after completing Phase 3

- Add/maintain user accounts
- Provide migrant data file updates
- Process migrant data file updates
- Communicate MSIX rollout status
- Provide support to MSIX users
- Train MSIX Users

States must complete Phases 1-3 to begin the MSIX on-going operations phase

MSIX Training and Support Tools

MSIX Trainer's Toolkit

- Training Strategy

- User Training
  - Helping Your Users Get Started with MSIX
  - Training Your Users
  - Post-training Support for Your Users

Training Roles and Responsibilities

- **State Trainer** – MSIX state expert who coordinates MSIX training programs for their state
  - Trains other state trainers and expert users
  - Point-of-Contact for State's Training Team
  - Direct access to Deloitte Trainer (MSIXTeam@deloitte.com) and Help Desk
- **State Training Team –** Trainers who deliver user training for their state
  - Proportionate in size to State's migrant program
  - Trained by State Trainer or in Post Regional Conference (according to state's training strategy)
  - Point-of-Contact for State's Users
  - Direct access to State Trainer and Help Desk
- **Users** – All MSIX users
  - Trained by State Training Team (according to state's training strategy)
  - Direct access to State Training Team and Help Desk
- **MSIX Training Team**
  - Trains Regional Conferences and Post Regional Conferences
  - Available to conduct train-the-trainer sessions, videoconferencing, and Webinars
  - Continues to assess training materials based on feedback
  - Updates training materials with new releases
  - Directs access to Help Desk escalation resources or MSIX technical team
  - Maintains all training resources and tools

Training Types

- Train-the-Trainer Training (T-T-T)
- Instructor-led Training
- Online Training
- Videoconferencing
- Webinars

Training Phase – Implementation Process

State Trainer attends Regional T-T-T Conference

↓

State Trainer identifies State Training Team

↓

State Trainer trains State Training Team or sends to Post Regional Conference

↓

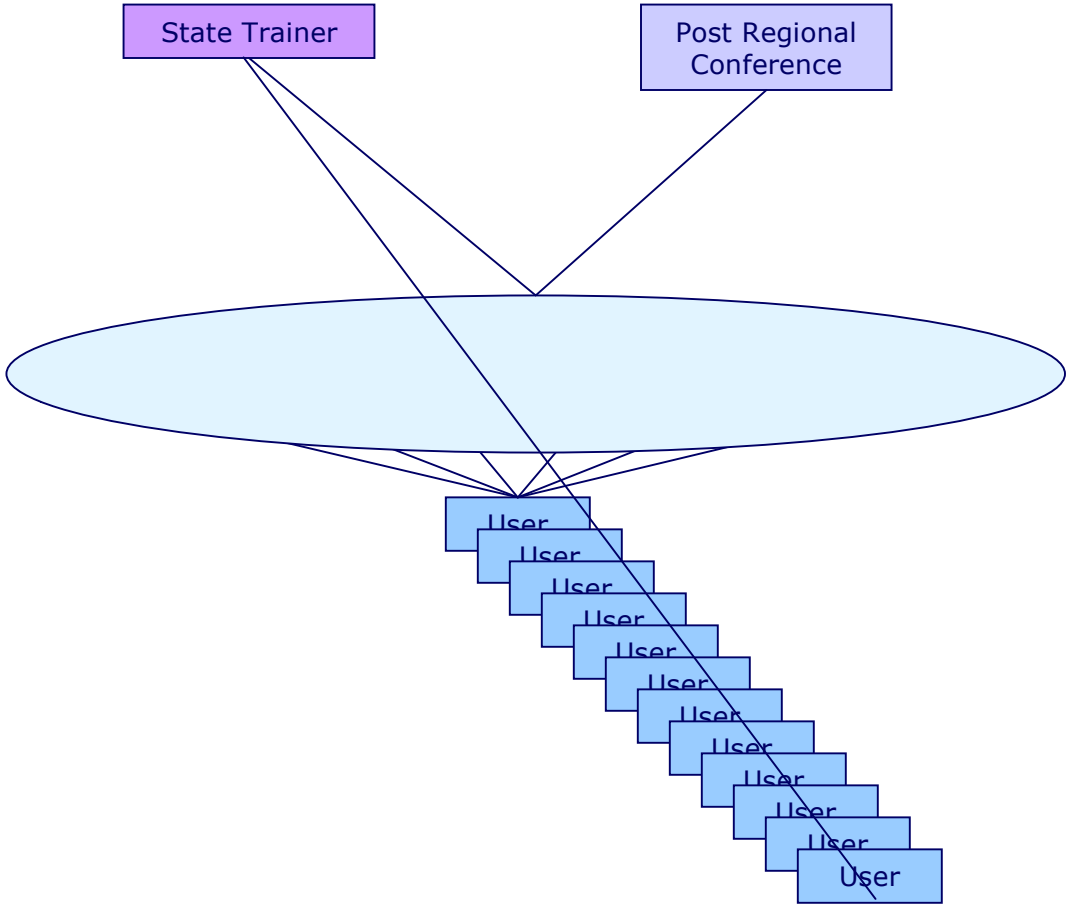
State Training Team communicates training resources to Users

↓

Users conduct Self-Training

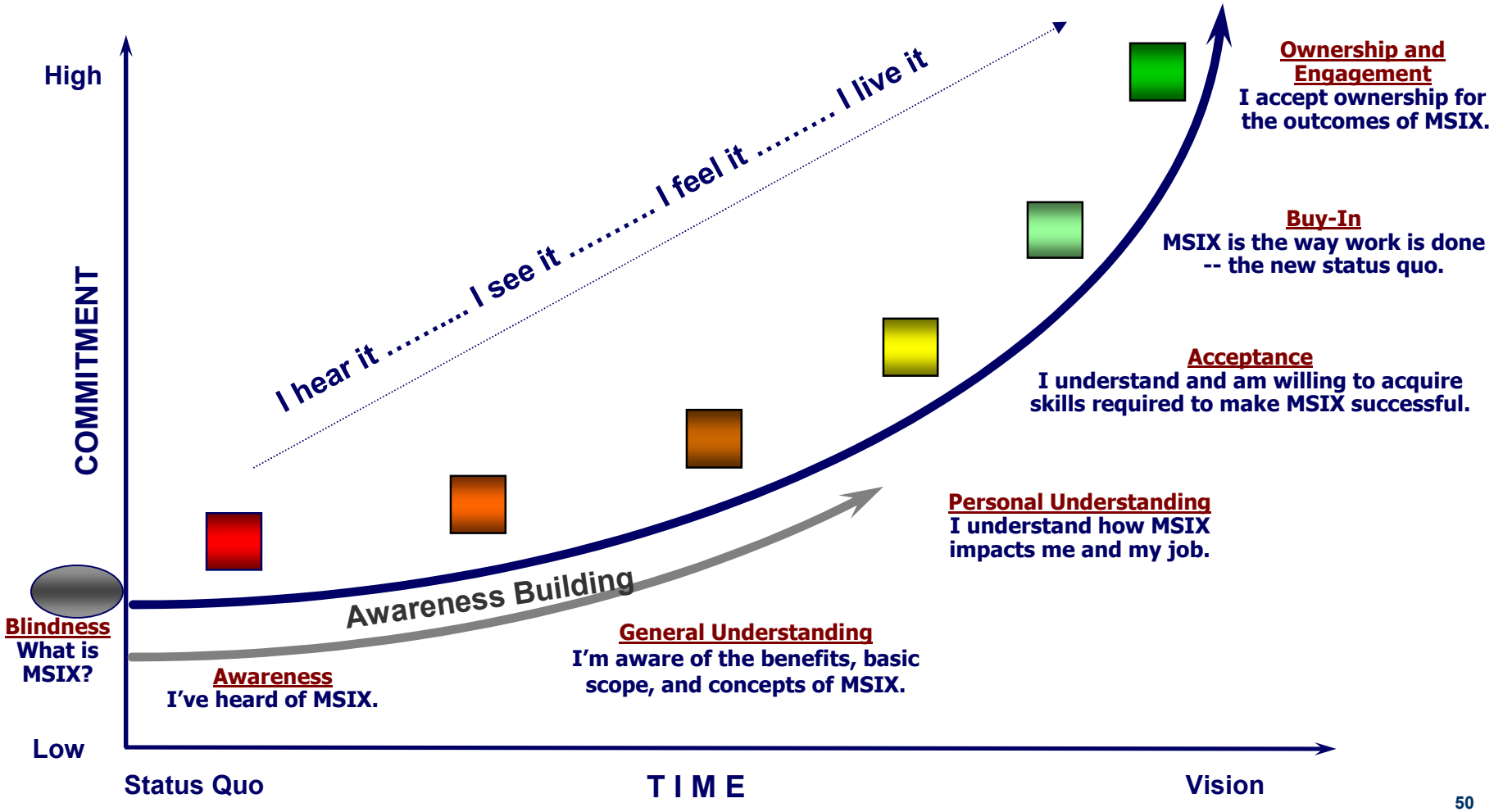
↓

Users are ready to use MSIX



Change Curve: Building Personal Commitment to MSIX

The goal of MSIX Training & Support is to move user up the Change Curve to fully adopt and embrace MSIX.



Supporting Change – The Role of a Champion

- What does this role look like?
- Why is a Champion important?
- How should a Champion respond?

Will YOU be
their Champion?

User Administrator Role

User Administrator Role Overview

- 3 User Administrator Levels
  - OME User Administrator – Creates 1 State User Administrator for each State
  - State User Administrator – Minimum 1 per state required
  - Regional User Administrator – State Option
- Potential Users
  - State MEP Administrators
- Key Functions
  - Create user accounts
  - Assign user role(s)
  - Update user account information
  - Deactivate user accounts
  - Reset passwords *(MSIX help desk does not reset passwords)*

MSIX Help Desk

Help Desk does…	Help Desk does not…
• provide support to MSIX users • answer questions about MSIX • receive and coordinate resolution of MSIX issues.	• reset passwords • create new users • deactivate or disable existing users

MSIX Functions by User Role

	Primary User	Secondary User	District Data Admin	Regional Data Admin	State Data Admin	State Region Admin	Regional User Admin	State User Admin
My Account	X	X	X	X	X	X	X	X
Search, Display, Print, & Export Student Records in own state	X	X	X	X	X			
Search, Display, Print, & Export Student Records in all states	X		X	X	X			
Generate Reports		X	X	X	X			
Send Student Move Notices	X	X	X	X	X			
Initiate Student Merges and Splits	X		X	X	X			
Validate / Reject Student Merges and Splits			X	X	X			
Access District Worklist Items			X					
Access Region Worklist Items				X				
Access State Worklist Items					X			
Create / Modify State User Level Accounts								X
Create / Modify Regional Level User Accounts							X	X
Create / Modify School or District Level User Accounts							X	X
Reset Passwords							X	X
Enable Regional Functionality						X		
Create / Modify Regions						X		

User Application Process

Training	Applicant	Local Authority	MSIX State User Administrator
•Obtain an training from MSIX site •Complete training •Submit training certification	•Obtain an application from MSIX site •Complete application •Submit application to local administrator with appropriate identification	•Review entire application for completeness •Verify applicant's job title and requested MSIX role •Complete administrator portion of the application and submit application to MSIX State User Administrator	• Review entire application for completeness for both applicant and administrator portion • Create account based on information provided on application • Retain application for official records

- Additional Resources
  - User Administration Guide
  - User Access Guide and Application

User Administrator
Online Training

User Administrator
Hands-on Exercises

State Region Administrator Role

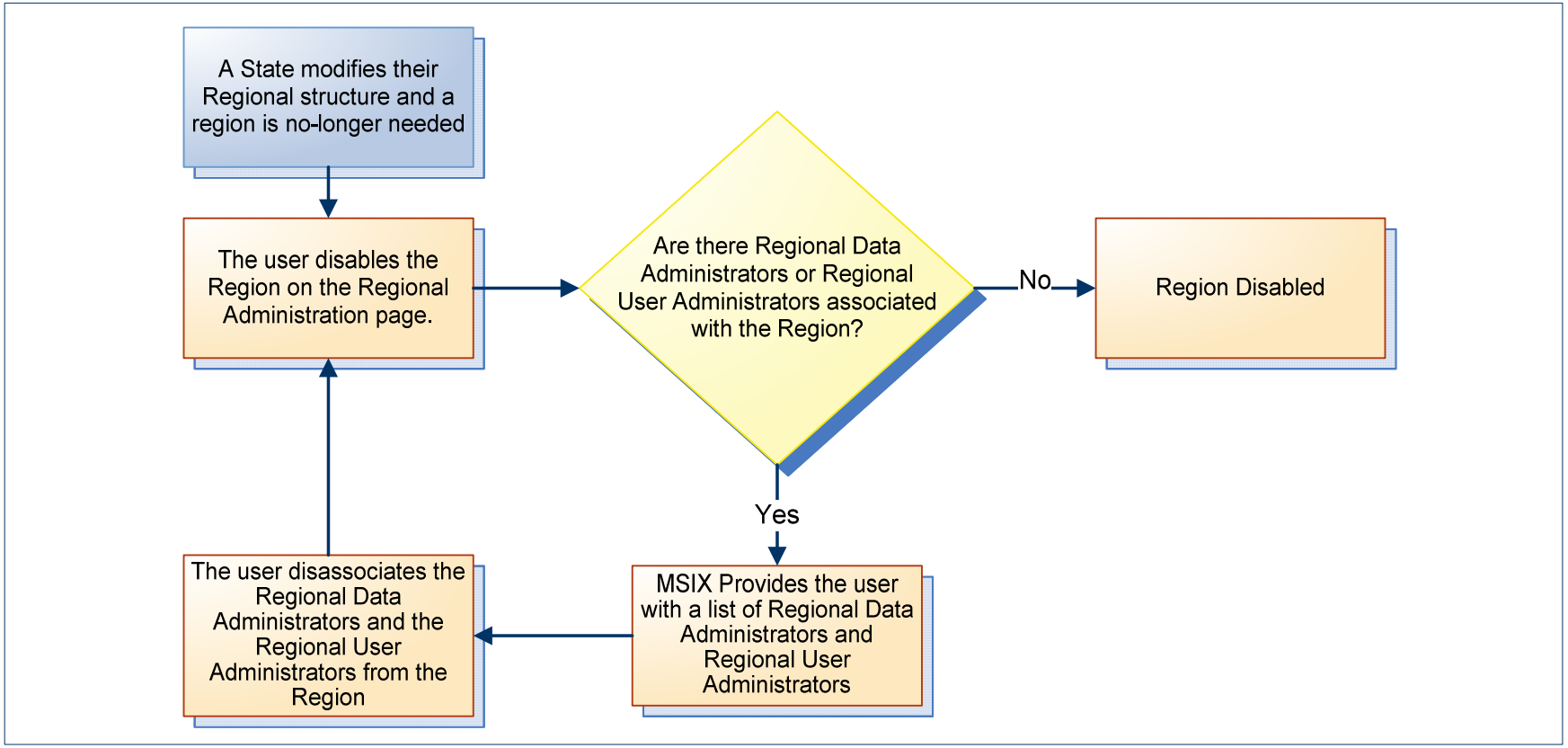
State Region Administrator Role Overview

- Required role for states using optional Regional functionality
- Potential Users
  - State MEP Administrators
- Key Functions
  - Enable and disable regional structure
  - Create new regions
  - Associate districts to regions
  - Edit regions

State Region Administration

- Regional functionality is optional
- Regions do not have to be official regions
  - Create to group districts
  - Create for specific work streams
- Regions consist of groups of School Districts within a state
- Regional structures may be used for User Administration, Data Administration, or both

Disabling a Region



State Region Administrator
Online Training

State Region Administrator
Hands-on Exercises

Next Steps

Next Steps: Suggested State Rollout Activities

	STATE DATA SUBMITTERS	STATE TRAINERS & USERS
October		
1-5	Complete State Profiles; Schedule data file tests; Submit test data files	Attend MSIX Rollout Training Sessions in Portland (Sep 24-25, 2007), DC (Oct 1-2, 2007) or Chicago (Oct. 4-5, 2007)
8-12	Process and test State interfaces	Beginning Oct.11: MEP Directors designate State User Administrators (SUAs); SUAs: ▪-take online training; ▪-read User Manual ▪-familiarize yourself with MSIX and the minimum data elements; ▪-set up regions; - verify that districts and schools are up-to-date in MSIX - notify EDFACTS staff if there are missing schools or districts ▪- set up User Accounts;
15-19	Test data file for proper formatting; Load data file into MSIX; Report results of loading data file; Verify that data records loaded correctly;	
22-26	Continue activities above	
Oct.29-Nov.2	Submit live data files, and MSIX begins to load live state data	
November		
5-9	Continue to load live data	•Users review User Manual ▪Users take online training; ▪Users request approval for MSIX access; ▪SUA's establish user accounts
12-16	Continue to load live data	
19-23	Continue to load live data	
26-30	Continue to load live data	All Users have access to MSIX

Questions??